



APPLICATION FOR RECORDS RETENTION SCHEDULE

OFFICE OF THE SECRETARY OF STATE
DEPARTMENT OF ARCHIVES AND HISTORY
RECORDS MANAGEMENT DIVISION

INSTRUCTIONS: See Publication No. 76-RM-1 for instructions on completing this form. Forward signed original to Department of Archives and History, Records Management Division, 330 Capitol Avenue, Atlanta, Georgia, 30334, Attention: Scheduling Section.

FOR AGENCY USE		FOR RECORDS MANAGEMENT USE	
Application Date	1. Agency Address Office of Planning and Budget Internal Operations Division Room 612 270 Washington Street Atlanta, Georgia 30334	Application Number 79-175-A	Date Received DEC 17 1979
Application Number		Date Completed DEC 31 1979	
2. Person to Contact Bill Smith		Working Title Special Assistant to OPB Director	Telephone Number 656-3833
3. Action Requested a. <input type="checkbox"/> Establish Retention Schedule; record will continue to accumulate. b. <input type="checkbox"/> Dispose of present accumulation; no further accumulation anticipated. c. <input checked="" type="checkbox"/> Amend Application No. 79-175 Check One: <input checked="" type="checkbox"/> Change; <input type="checkbox"/> Supersede; <input type="checkbox"/> Void			
4. Dates of Series Earliest FY 78	Latest to date	5. Records Series Title (followed by title used in office; if different) ANNUAL BUDGET REPORTS FILES	
6. Division and Office Function What is the function of the Division and the Office in which this record series is created? Headed by a Director, this Division is responsible for providing support services to all Divisions and personnel within the Office of Planning and Budget. These services include preparation of the OPB Budget, maintenance of agency fiscal records, supervision of purchases, supplies and inventory controls, preparation of all graphics materials, and performance of all personnel services. This Division also provides these same services to the Office of Consumer Affairs, the Consumers Utility Counsel and the Governor's Committee on Postsecondary Education under the "administrative purposes only" provision of reorganization.			
7. Record Series Description This file contains the following documents (include form numbers and titles, if any): Attach samples of the file. Documents relating to: proposing and amending the annual State budget for Georgia. Included are: publications entitled: (1) The Annual Budget Report for Georgia (2) The Capital Budget Report (3) The Amended Budget Report (4) The Budget In Brief (5) The Governor's Policy Statement (6) Any other similar publications that may be added in the future. File is arranged: chronologically by fiscal year.			
8. Monthly Reference Rate How often are records referred to which are: One to six months old _____; Seven to twelve months old _____; Thirteen to twenty-four months old _____; twenty-five months and older _____?			
9. Annual Rate of Accumulation of Records Letter-size drawers _____; Legal-size drawers _____; Shelves _____; Other (specify) _____			

YES	NO	10. Questionnaire (Place an "X" in the proper column)
X		a. Is this the official copy of the series? If not, where is it?
	X	b. Does the series contain confidential information requiring security handling? If yes, cite law or regulation.
	X	c. Is this a vital record?
X		d. Does this series have historical or long term research value?
	X	e. When one or two documents in the file make it necessary to keep the entire file for a long period, could these documents be scheduled separately?
X		f. Is the information contained in this series ever published? If yes, attach copy. Appropriations Act/General Assembly
	X	g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy.
X		h. Is there a duplication of this series in your office, or in another office or agency? If yes, where? throughout all State agencies
	X	i. Is this series (or a major portion of it) regularly microfilmed?
	X	j. Does the record series result in a computer printout?

11. Retention Requirements

The following requires the series to be kept:

- | | | | |
|--------------------------|--------------|-----------------------------------|--------------------------|
| a. State Law | _____ years. | d. Audit period | _____ years. |
| b. Statute of limitation | _____ years. | e. Administrative need | <u>HISTORICAL</u> years. |
| c. Federal law | _____ years. | f. Federal retention instructions | _____ years. |

Attach copy or excerpt of laws or regulations. Explain administrative need.

12. Approved Disposition Instructions

This agency recommends that the file series be cut off at the end of each:

☐ Calendar Year; ☐ Fiscal Year; ☐ Other _____ then,

- ☐ Hold in the current files area _____ month(s) _____ year(s); then
- ☐ Transfer to local holding area, hold _____ year(s); then
- ☐ Transfer to State Records Center; hold _____ year(s); then
- ☐ Destroy.
- ☐ Transfer to State Archives for permanent retention.
- ☒ Other (Specify)

Cut off file each July 1st and upon publication of the "Budget In Brief"; then transfer to State Archives for permanent retention.

These instructions apply to all prior and future accumulations of the series.

Agency Head/Designee (Signature)	Date	Records Management Officer (Signature)	Date	
<i>Bill Smith</i>		<i>Joe Braselton (mkt)</i>		
Recommendations in paragraph 12 are approved. (If disapproved, attach letter of explanation.)		State Records Committee (Signature)		
		State Auditor/Designee	<i>[Signature]</i>	<i>12-27-79</i>
		Secretary of State/Designee	<i>Carroll Hart</i>	<i>12-21-79</i>
	Attorney General/Designee	<i>[Signature]</i>	<i>12-28-79</i>	



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Application Number		Date Received SEP 28 1979	Date Completed OCT 16 1979
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	X	g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy.
X		h. Is there a duplication of this series in your office, or in another office or agency? If yes, where? <u>THROUGHOUT ALL STATE AGENCIES</u>
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	X	j. Does the record series result in a computer printout?

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Agency Head/Designee (Signature)	Date	Records Management Officer (Signature)	Date
<i>J. W. Braselton</i> (MAE)	9/28/79	<i>J. W. Braselton</i> (MAE)	9/28/79
		State Records Committee (Signature)	Date
Recommendations in paragraph 12 are approved. (If disapproved, attach letter of explanation.)		State Auditor/Designee	10-12-79
		Secretary of State/Designee	10-10-79
		Attorney General/Designee	10-12-79